

# T<sup>3</sup>: Trustee Training Tips

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## RECRUITING WITHOUT MISLEADING

Kentucky statute limits the time a trustee may serve on a library board, resulting in a continual turnover of members. As most boards readily recognize, recruiting new trustees can be a daunting task. Every board wants its membership made up of the best possible choices—a team of dedicated individuals with a passion for public libraries in general and the home library in particular. But how does one successfully recruit such a combination of library advocates?

Like any relationship able to go the distance, honesty is essential. While it may be tempting to tell “The Big Lie” when approaching potential trustees, resisting the temptation is always the best policy. What is “The Big Lie?” It’s promising that all one will be expected to do is attend a one-hour meeting each month. Prospective board members need to know that monthly meetings are only a part of their job as trustees.

Some libraries have held pre-orientations for potential board members to give them an overview of what trusteeship is all about. It would be wise to involve your regional librarian, asking him to do an abridged version of the regular *New Trustee Orientation* for this audience. Involving him can serve two purposes: (1) it adds a layer of insulation should the library director and current trustees think one or more of the attendees are not well suited for this board at this particular time; and (2) KDLA’s regional representative can speak to the generalities of trusteeship, leaving the issues specific to a given library for local input, which may or may not be addressed at this time. Conducting a pre-orientation should in no way be construed as a promise that an individual will be nominated should she express interest.

Trustees can also spend some time looking at their long-range or strategic plan to help determine what specific skills they will need in the near future. Perhaps a look at how one’s library rates in the *Standards for Kentucky Public Libraries* might help identify needed skills as well. Knowing what areas of expertise one needs is an excellent first step in searching for new board members. Once again, honesty is the best policy. If you are expecting perspective members to provide certain skills—which must be done *pro bono*—tell them before they are appointed.

Bottom line: you are bestowing an honor, not imposing on people, when you ask them to consider being on your library board. It always needs to be perceived that way and the perception comes from you.

## RECRUITING TIPS

The most essential components of a strong and vital board are the selection of good people and their thorough training about the library. Trustee training is not accomplished in just KDLA's *New Trustee Orientation* and the local board and director's initial instruction. It is an on-going, never ending process, but it only works well if the selection has been done well.

Library board membership is not a reward for your best patrons—unless they bring something you need at this time to the table. Nor should current members look only among their friends, co-workers, or relatives. Diversity is what you are seeking and this doesn't mean simply geographic distribution, gender, race, age, etc. With only a few members, it is vitally important to have diversity of skill and community influence as well. And while a congenial group is always nice, looking too "close to home" can result in an inbred board where all think much the same way. Nothing guarantees stagnation more.

On the other hand, packing your board with only the community's most powerful and influential people can fail as well. An all alpha board can bog down in control issues (everybody wants to be in charge) and frequently these individuals do not give your board the broad diversity it needs.

Approaching prospective trustees should be carefully planned. It should be done by trustees, acting with the full consent of the board, rather than the director. Caveat: Never, ever, should a single trustee be sent to find her own replacement. A list of names should be discussed by the board and choices made by the *whole* board. Ideally, a recruiting team of two trustees should approach each individual the board has chosen. This recruiting team may include

the departing member, but it also has a trustee who will be remaining on the board. Think of it as peer-to-peer recruiting.

What is the director's role? He may contribute to the board's discussion of names as freely as his board desires. But his is only one voice. Remember that the director is the board's employee and not many employees get to hand-pick their bosses. Remember, too, that the director has valuable insight about the library's needs and can frequently suggest very promising candidates for board membership.

The team may find it needs to develop different strategies for different prospects, but regardless of the strategy, the approach should be made face-to-face. Always keep in mind how important your library is and project the service of board membership with the dignity and importance it deserves. While you don't want to scare anyone, keep in mind that all trustees are legally, financially, and morally responsible for what the library does and doesn't do.

Plan your "pitch" to prospective members. Use handouts if you wish; either your director or your regional librarian can provide you with a couple of simple, yet instructive, items your prospects can take home for further study. A trustee job description would be a good choice. Don't overload them, keep information general at this point, and keep both written and spoken comments free of library jargon. Assure them additional and more in-depth training will be done once they come on board.

Pick only the best people for your current situation, train them well, call upon KDLA for help, and always be honest with new recruits and seasoned veterans about library issues. You should have a board of winners!

## RECRUITING INTERVIEW

The previous article suggested a team of two trustees approach each serious candidate for board membership in a face-to-face setting. Think of this as an interview—an interview for a very important, albeit voluntary, job.

What might the recruiting interview contain? James Hardy, a management consultant specializing in non-profit organizations, recommends these nine steps:

- 1) Introductions.
- 2) Why you are here: present the invitation to serve.
- 3) Tell about the library in general: its mission, goals, programs, and plans. Share your own convictions about the library's importance.
- 4) What the board does: its authority, organization, and operating methods. Share your own experiences on the board.
- 5) Current challenges facing the board: current involvements that are exciting (perhaps a new building?).
- 6) Why, in particular, this person is wanted on the board: this kind of personalization is key to a successful approach.
- 7) Time and energy required: emphasize training is provided; share your current *Twelve Month Agenda*.
- 8) Asking/answering questions: you may find it necessary to ask some questions of your own at this point, such as, "What have you enjoyed in previous board assignments?" "Liked least?" "What role do you see for our library?"
- 9) Ask when you may call for the decision: guard against an on-the-spot decision at the interview; "give her time to think about it."

## LETTER OF COMMITMENT

Once the prospective trustees have said "yes" and the board has voted to nominate them, consider a Letter of Commitment before submitting names to the appointing authority. Taxing districts need to let both candidates know how the appointment process works and that only one will be chosen.

This letter should include the following information: date of term expiration; times and dates of meetings; attendance requirements; inability to hire relatives or to sell goods or services to the library; trustee development opportunities/expectations (orientation, conferences, statewide and regional workshops, publications, etc); committee assignments; and special events participation. The letter also needs to enumerate what will be provided for the trustee as well—such as liability insurance and/or membership in professional organizations like KLTA and ALTA.

Send two copies to be signed; one returned to the library and one kept. If your chosen ones are having second thoughts, now is the time to know. This is also a great opportunity for current trustees to review their commitments.

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## LIBRARY LETTERS

*Dear Marian Librarian,  
We all try hard to be a good library board, but  
how can we know if we are?*

*-- Troubled Trustee*

Dear Troubled,

Ah, to have the gift to see ourselves as others see us. We don't, but there are some tools your board can use to evaluate its effectiveness. Ask your regional office for board evaluation forms for each trustee to fill out and bring to a meeting for group discussion. Visit other library boards and share your observations with your own board—are they doing something you should be? Attend as many workshops and conferences as possible and always have attendees share what they learned with the rest of the board. Consider a board retreat. Look at the Governance section in the Kentucky Public Library Standards manual. The fact that you're asking is a very healthy sign.

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## HOW MUCH DO YOU KNOW?

The following quiz will let you test your knowledge on the topics covered in this publication. The answers are under "Publications" on KDLA's web page <<http://kdla.ky.gov>>.

1. What is a way library boards can develop a pool of interested citizens for future board membership?
2. What two things should guarantee an excellent board?
3. How should a prospective board member be approached to help assure acceptance?
4. Why should we bother with this Letter of Commitment? Sounds like busy work to me.
5. Why should I bother to go to the KDLA web site to see the answers to the quiz each time? I can read and it is easier if I'm not sure of the answer to just re-read the article.

**ADDRESS CORRECTION REQUESTED**  
**PLEASE FORWARD**

## Answers to T<sup>3</sup> Quiz

**1. *What is a way library boards can develop a pool of interested citizens for future board membership?*** [page one]

While there are several ways mentioned, such as using the Standards and the library's long-range plan to identify needed skills, the idea of an existing pool of individuals who have expressed interest is a comforting thing indeed. Not only are these folk potential trustees, many may also be interested in volunteering for special projects (annual book sale, helping chaperone a teen project/program, or assisting with Summer Reading projects to name just a few). A successful idea already in use is hosting a "pre-orientation" for potential prospects. This is probably best done by your regional consultant because he can give a brief overview of the essential elements of public library trusteeship in Kentucky and, because he is an outsider, he provides a cushion between the I-want-to-be-on-this-board-even-though-it-is-obvious-I-am-not-what-you-need person and the current trustees. Sometimes it is awkward to pass over people you know well, and while we are in no way suggesting you blame it on your presenter, there is that subtle, unacknowledged thought that he was the one responsible for Crazy Lady Number One being passed over.

**2. *What two things should guarantee an excellent board?*** [page two]

Carefully selecting good people for the job (making the right match) and providing them thorough training. One more word about good people—what is "good" this year may not be good enough in two years. Keep your people matched to your needs. And it's easy with term limits on trustees providing vacancies on a continual basis.

**3. *How should a prospective trustee be approached to help assure acceptance?*** [pages two & three]

The best way is a prepared team of two trustees in a face-to-face meeting with the limited pool of individuals the whole board has agreed to ask. Have a few (no more than 3) handouts; do not speak in library jargon; be honest about everything.

**4. *Why should we bother with this Letter of Commitment?*** [page three]

You are certainly not required to do this, but it has value for you. It is like a contract between the new trustee and the board of trustees. It briefly says what is expected from both parties and, in doing so, creates a business-like professional tone. It also gives anyone having second thoughts about doing this an opportunity to back out before the actual appointment goes through. Many boards have gone through a few months of orienting and training newcomers only to have them resign or miss too many meetings to remain on the board. Far too often this is because they were misled into thinking nothing much was required of them and now they know that isn't so. Had there been an easy way to rescind their nomination, they likely would have used it. And, it is also a good time for your seasoned trustees to review their commitment level.

**5. *Why should I bother to go to the KDLA web site to see the answers to the quiz each time?***

If you had, you would know that the answers provided here are more in-depth and contain new information. It is not just what was in the article, but expanded and a bit more humorous at times as well—just ask Crazy Lady Number One. And, we hope once you visit our website you'll stay to see other things your state library agency has to offer.